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2004 | TOURISM PLAN


NOVA SCOTIA
Tourism Partnership
LOUNGE



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2004 Tourism Plan



Today's Presentation

- 2003 in review
- Looking ahead
- Nova Scotia's brand
- Priorities for 2004
- Customer-centred programming
- Partnerships

2003 in review: The Big Picture

Global and national pressures on tourism industry:

- Weak economic growth in Canada and Europe
- Economic growth in USA but with slow job growth
- SARS
- War and security concerns in USA
- Political discord soured US - Canadian relations
- Industry challenges (insurance costs, last minute bookings)
- Fires...blackouts...hurricanes...what's next?
- Rising Canadian dollar - that's what.

2003 in review: Industry Results (Canada)

- Challenging year globally and nationally
- Overall traffic to Canada* down:
 - USA: -14%
 - European: UK - 5%; Germany -11%
 - Asian: - 41%
- Some regions hit harder than others:
 - Alberta fared the best in USA visits: -1.9%
 - Ontario most extreme drop: - 20.3%
 - Atlantic Canada slightly better than average at -12.7%

*Jan-July 2003/02. Source: Statistics Canada / CTC

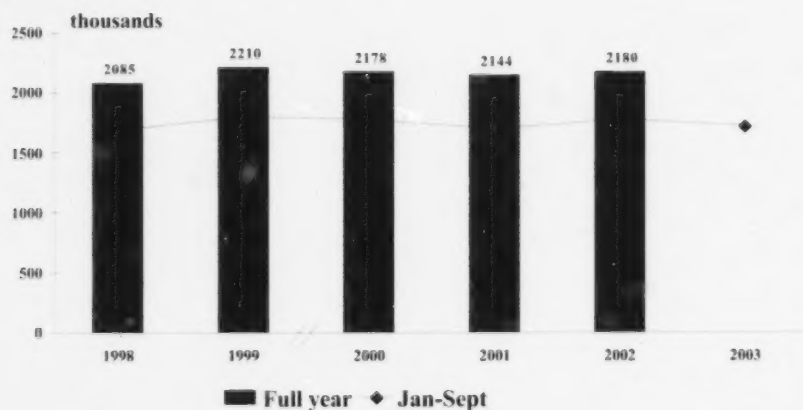
How Nova Scotia navigated the storm

- In relative terms, Nova Scotia's industry fared better than many
- Results were "skewed" - markets, mode of travel and regional performance differences
- Modest declines in a number of key indicators:
 - Visitation
 - Accommodations
 - Other metrics
- Strength in some measures
- Tangible evidence of a changing marketplace

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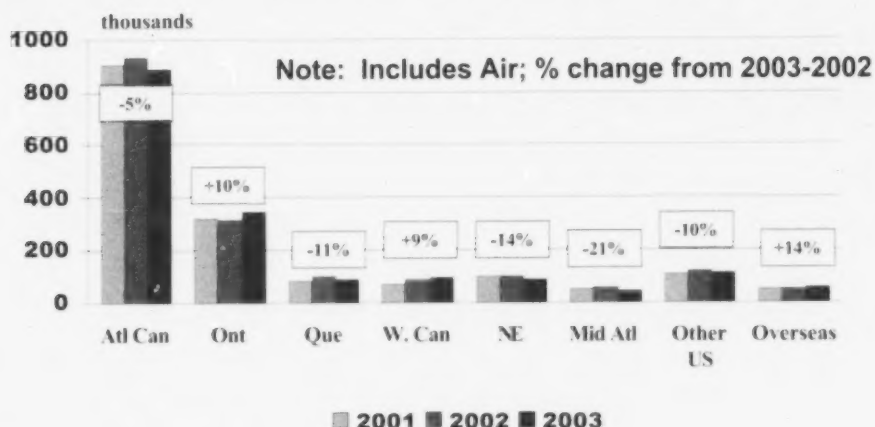
Non-resident visitation 1998 - 2003



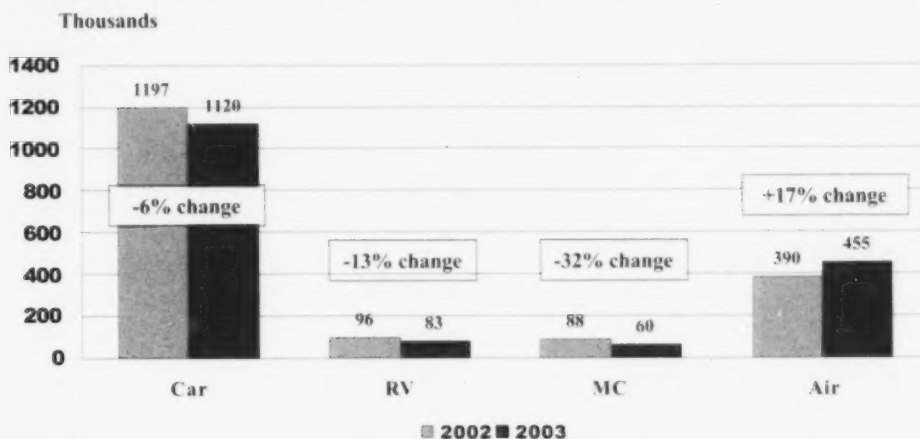
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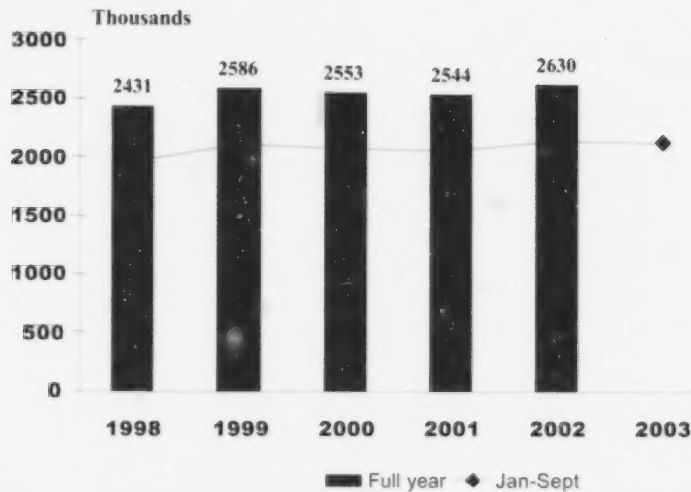
Non-resident visitation by market January to September, 2002 - 2003



Non-resident visitation by mode January to September, 2002 - 2003



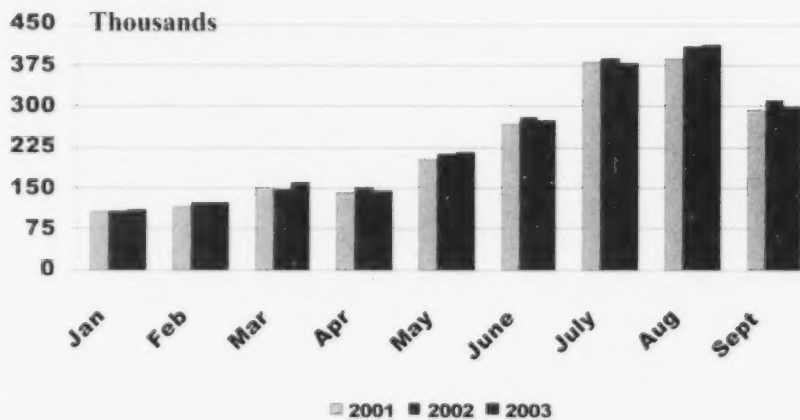
Room-nights sold 1998 - 2003



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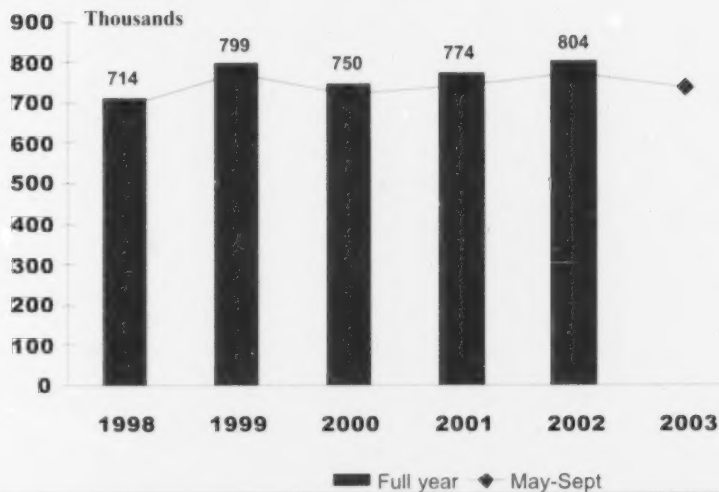
Room-nights sold January to September, 2001 - 2003



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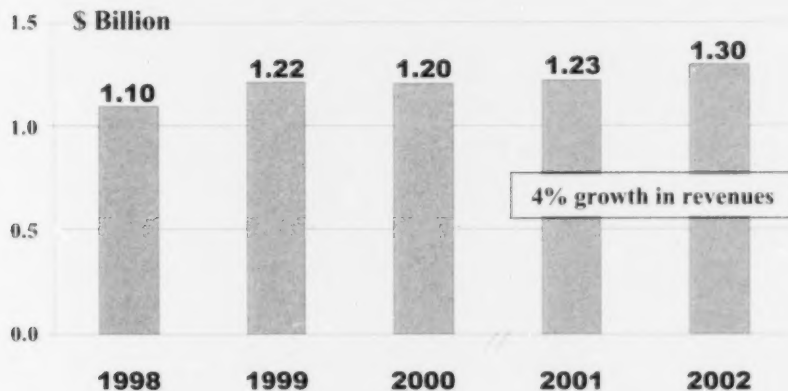
Campsite-nights sold 1998 - 2003



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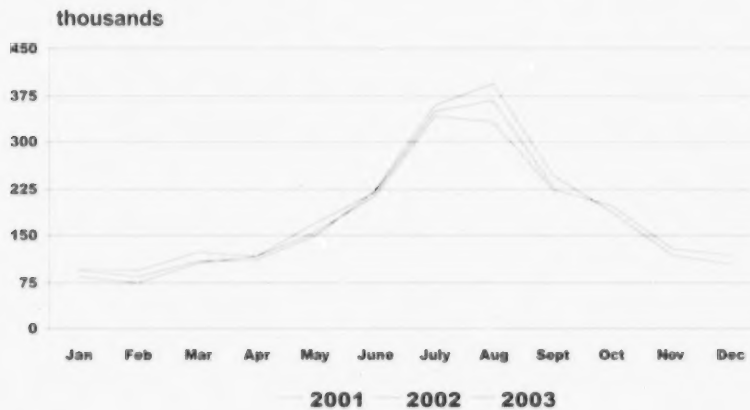
Tourism's Economic Impact 1998 - 2002



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Visitation by month 2001 - 2003



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Origin of Visitors 2000 - 2002 (000s)

	Atl. Can.	Ont.	Que.	Oth Can.	East US	Oth US	Overseas
2000	1142	444	101	115	183	138	57
2001	1204	394	96	93	171	123	63
2002	1206	372	114	108	178	143	60

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2003 Product Development Highlights

- Tourism Development Investment of approximately \$540,000 partnered on 37 projects totaling over \$2 million
- Plan and delivery of successful Product Development Day (April 2003) focused on *Quality of Experience*, over 85 participants
- Partnered on development and enhancement of Acadian tourism projects (ie. Grand Pré Interpretive Centre and animation; Pubnico Anniversary Pageant)
- Coastal hiking trail development and 'Take a Hike' interpretive brochure
- Supported industry development initiatives through Nova Scotia's Tourism Human Resource Council

2003 Marketing Highlights

- Toronto Travel and Leisure Show promotion
- Right Here Right Now Campaign
 - Awareness
 - TIAC Award
- Consumers continue to move towards the Internet for information
- While inquiries by telephone from conventional media fell...
 - Visits to novascotia.com up 23%
 - PDF downloads up 380%
- More than \$27 million worth of editorial coverage generated in 2003

S.W.O.T: Strengths

- Unique combination of competitive product strengths:
 - Seacoast scenery combined with a rich history, culture and outdoor experiences
 - “Right-sized” urban experiences
- Emerging strengths:
 - Meetings and Conventions product, Golf, Cruise destination
- Improving domestic air transportation access
- Brand equity / leadership in attracting Atlantic Canada visitors
- A safe destination
- Cost-competitive for most our markets
- Strong partnership environment and shared Vision!

S.W.O.T.: Weaknesses

- Transportation access to some major population centres
- Low top-of-mind awareness outside region
- Seasonality Issues
 - Limited off-season activities
 - Capacity in prime season
- Limited French language service
- Infrastructure - quality of facilities and roads
- Capacity for larger meetings and conventions during peak season

S.W.O.T.: Opportunities

- Increasing use of Internet for travel planning
- Maturing and active population and increased appeal of getaway packages for mature and senior travelers
- Travelers are increasingly looking for enriched experiences
- Partnership opportunities / enhancements
- Untapped potential in target markets
- Demand for major product categories
- Additional revenue per visitor

S.W.O.T.: Opportunities

- Major events to leverage in 2004/05
 - Congrès mondial acadien 2004 (Province-wide)
 - Acadie 2003 - 2005 Celebrations (Province-wide)
 - Tall Ships 2004 (Province-wide)
 - IIHF World Women's Hockey Championships (Halifax)
 - 2005 East Coast Music Awards (Cape Breton)
 - LPGA event: BMO Financial Group Canadian Women's Open (Halifax)

S.W.O.T.: Threats

- Global pressure on travel / tourism industry:
 - Security and safety concerns
 - Economic uncertainty
- Some travel intermediaries / operators in jeopardy
- Accessibility to European market
- Access to capital to enhance tourism plant
- Marketing challenges:
 - Increased efforts by competing destinations
 - Privacy legislation
- Fluctuating exchange rates
- Access to affordable insurance

Conclusions

- Rising Canadian dollar poses short-term challenges
- Positive USA economic news is welcome, but....
- Economic jitters may persist - recovery, but slow job growth
- Air fares are comparatively low, domestic capacity is strong
- Travel planning channel shift will continue - Growth in Internet
- Consumers are becoming "price loyal":
 - Well trained to look for last minute deals
 - Internet turning brands into commodities
- Demand for packages and experiences - product development opportunity
- Maturing population and affluent visitor present both opportunities and challenges

Branding

- The set of beliefs about our product that exist in the customer's mind
- A brand is a bundle of implied promises!
- Functional and emotional benefits
- Building a connection with visitors on an emotional level
- It's about the experience
- We all play a role in delivering the experience!

Branding

- The brand positioning statement is critical
- It defines the unique place that we want the brand to hold in our customer's mind
- All the visitors' experiences with Nova Scotia should reinforce this impression
- Product development, sales and marketing functions must therefore support a common brand positioning

Brand Positioning Statement:

**“To people who appreciate the sea,
Nova Scotia is Canada’s foremost seacoast
destination
that offers an authentic experience for your body
and soul better than any other destination
because
only Nova Scotia uniquely combines
spectacular scenery, living tradition, maritime
culture and lifestyle with a feeling of deep-down
spiritual satisfaction.”**

Priorities for 2004

- Internet marketing
- Vision recommendations
- Experience-based product development initiatives:
- Major events

Priorities: Internet

- Internet usage continues to sky-rocket
- Short planning horizon, customers looking for deals

But:

- "Spam" up 500%
- Privacy issues

So...

- Use e-mail for high-frequency permission-based marketing
- More web-based product info and partner offers
- New look, more content
- Use proven media to increase awareness and drive web traffic

Priorities: Vision Recommendations

TPC to lead implementation on the following vision initiatives:

- Performance-based marketing
- E-marketing
- Star generators
- Geographic areas

T&C to lead implementation on the following vision initiatives:

- Nova Scotia's Brand
- Research

Priorities: Experience-Based Product Development

Seasonality product development:

- Birding
- Workshop April 7th, 2004
 - Educate, excite and energize industry and partners on seasonal opportunities

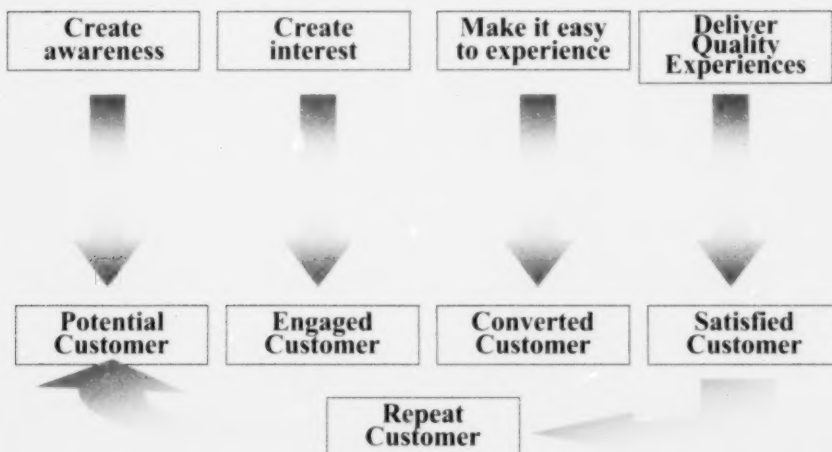
Quality:

- New initiatives with Human Resource Council
- Enhance quality of experiences

Priorities: Lever Major 2004-05 Events

- Acadian Celebrations: Province-wide visitation
 - Congrès mondial acadien 2004
 - Acadie 2003-2005
- Tall Ships 2004: Province-wide program visitation
- IIHF World Women's Hockey Championships: Halifax
- 2005 East Coast Music Awards 2005: Cape Breton
- LPGA event: BMO Financial Group Canadian Women's Open (Halifax)

Customer-Centred Approach



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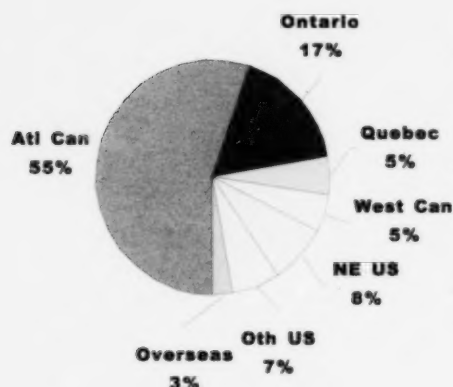
Experiential Touring



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Geo-demographics



Total Non-Resident Visitation 2002 = 2.18 million

AC: Families and couples, 35 + (female skew), post-secondary, HHI \$25K +, NB, PEI, NS, car

- Ontario: Families and couples, 45-64 (female skew), post-grad., HHI \$60K+, Toronto, car/ferries
- Quebec: Fr. Speaking Couples, 45-64 (female skew), HHI \$60K+, Montreal, car
- USA: Couples, 45-64 (female skew), post-grad, HHI \$60K+, Boston/Maine, car/ferry
- Europe: Couples, 30-65, post-secondary, HHI \$80K+, UK/Germany, air

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Customer Product Interests

Market:

Atl. Can. Quebec Ontario USA Europe

Seacoast, touring, cuisine, history, culture, outdoor

Shopping, Opportunity to describe widest variety of specific products, Urban messages	Acadian experience, Scottish culture, Cabot Trail, Fishing villages, Louisbourg, diversity	Scenery unique to Nova Scotia, Iconic history, Music/culture, Warmth of the people	Proximity, Foreign, a different cultural experience, Value for money, Warmth of the people	Weather, accessibility, Halifax is Foreign but not too foreign, Safe, Value for money
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Experiential Touring

What products do customers want?

Product-Market match analysis identifies product clusters where we have - or can *develop* competitive strengths:

- **Scenic Touring**
 - Sight-seeing, Shopping, Urban Experiences
 - Heritage - Museums, Historic Sites
 - Culture - Performing Arts, Arts and Crafts, Festivals
- **Outdoor / Nature**
 - Hiking / Walking
 - Whale Watching
 - Birding
- **Acadian Experiences**
- **Golf**
- **Cuisine & Wine**



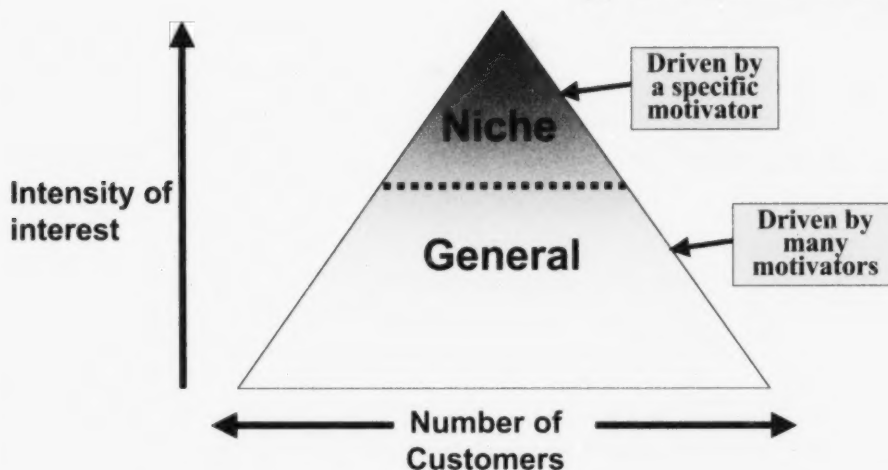
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The customer

Strategic Question: Which approach maximizes revenues?

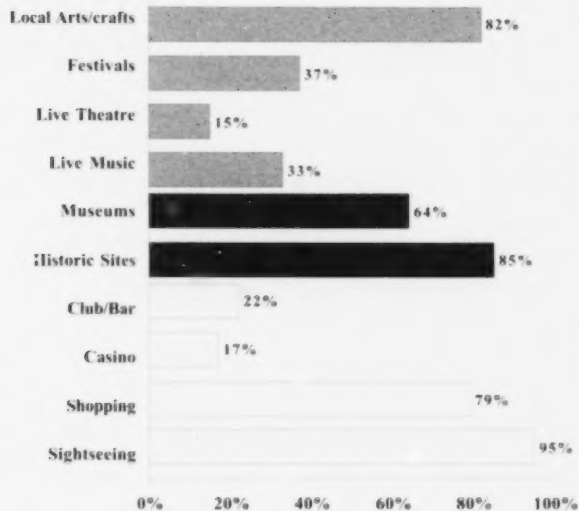


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Scenic Touring



Broad category, includes:

- Culture - Performing Arts, Arts and Crafts, Festivals
- Heritage - Museums, Historic sites
- Sightseeing, Shopping, Urban Experiences

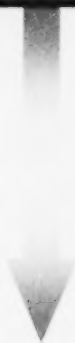
Source: 2002 Advertising Evaluation Study

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Experiential Touring >

Creating Awareness



Get into potential customers' "decision set" through:

- A combination of high reach and targeted direct marketing
- Promotions
- Media Relations
- Travel Trade
- E-Marketing

Potential
Customer

Engaged
Customer

Converted
Customer

Satisfied
Customer

Repeat
Customer

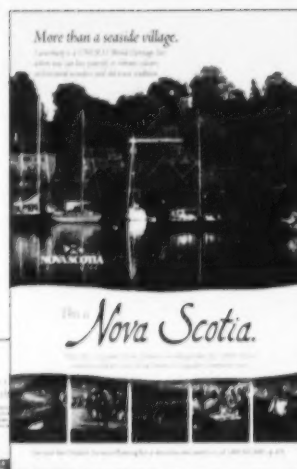
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Brand awareness advertising

- E-marketing:
 - e-mail
 - banners
 - search engine tactics
- Direct mail
- Print advertising
- Outdoor (billboards, transit shelters)
- Television
- Media relations



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Experiential Touring > Creating Awareness >

Message: Atlantic Canada

- Reaffirm product strengths
- Show variety diverse product
- Reasons to repeat visit (events)
- New discoveries unique to Nova Scotia
- Provide immediacy and retail opportunities
- Main call to action:
 - novascotia.com
 - 1-800-565-0000



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Experiential Touring > Creating Awareness

Message: Quebec

- "Terre et Mer"
- Show openness and welcoming
- A new, "Quebec-Friendly" alternative destination
- Reassure about French services
- Include Acadian product
- Contact us for more information!
- Main call to action:
 - Nouvelle-Écosse.com
 - 1-800-565-000



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Experiential Touring > Creating Awareness >

Message: Ontario

- "Canada's Seacoast"
- Authentic Maritime culture
- Friendly people, laid-back lifestyle
- Balance between modern and traditional
- Co-brand with compatible partners
- Main call to action:
 - novascotia.com
 - 1-800-565-0000



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Experiential Touring > Creating Awareness

Message: Northeastern USA

- "Canada's Seacoast"
- Authentic Maritime culture
- Foreign but friendly
- Value for money
- Easy to get to:
 - Locator maps
 - Co-branding with major transportation partners
- Reassure with modern / urban amenities
- Variety of things to do and see
- Main call to action:
 - novascotia.com
 - 1-800-565-0000



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Experiential Touring > Creating Awareness

Message: Europe

- Atlantic Canada regional brand primary positioning
 - "Canada's East Coast"
- Nova Scotia's stand-alone positioning
 - "Canada's Seacoast"
- Foreign, but not too foreign
- Value for money
- Halifax, urban centre for Atlantic Canada
- Co-brand with compatible partners
- Main call to action:
 - novascotia.com
 - Tour operator/transportation partners
 - CTC Mail houses/In-market representatives

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Experiential Touring > Creating Awareness

Media Program

- **FAMS with industry**
- **Editorial**
 - Feature Writing
 - Clipping / Monitoring
 - Media Kit
 - Images
 - novascotia.com
- **Media Tours**
 - Group Trips
 - Individual Journalists



Experiential Touring > Creating Awareness

Media Program

- **Media Relations**
 - Marketplaces
 - CTC Media Marketplace
 - Professional Associations
 - TMAC
 - Sales Activities
 - Media luncheons
 - Sales calls
 - Partnerships
 - CTC, ACTP

Experiential Touring > Creating Awareness

Sales Program

- Tour Operator Partnership Program
- Advertising
- In-Market Representatives (IMRs)
 - Agents in German-speaking Europe, United Kingdom and The Netherlands
- Familiarization Tours
- In-Market Sales Calls (All Markets)
- In-Market Promotions

Partnerships:

- Tour Operators
- Canadian Tourism Commission (CTC)
- Atlantic Canada Tourism Partnership (ACTP)
- Atlantic Canada Cruise Association (ACCA)



Experiential Touring > Creating Awareness

Sales Program

- Travel Trade Market Places
 - Bienvenue Québec
 - Ontario Motorcoach Association Annual Convention
 - Spotlight Canada, ITB Berlin
 - National Tour Association (NTA) Annual Convention
 - American Bus Association (ABA) Market Place
 - Atlantic Canada Showcase
- Consumer Shows
 - Salon vacances

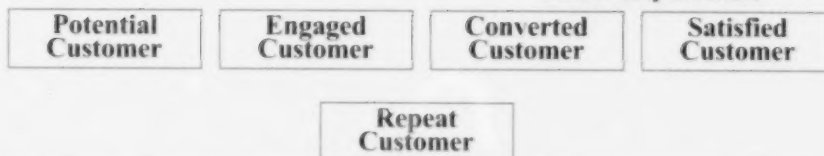


Experiential Touring >

Engaging the customer



- Scenic Touring:
 - novascotia.com
 - Travel Guide content
 - Motorcycle Guide
 - Travelways Map
 - Autumn Leaf Watch brochure
 - Take a Hike brochure
- Heritage:
 - Travel Guide content
 - Museum and Events Guide
- Culture:
 - Festivals & Events Guide
 - Web listings
 - Studio Rally brochure



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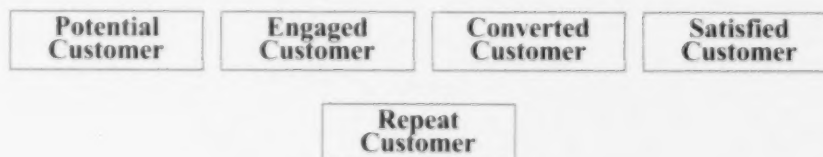
Make it easy to experience

Retail offers:

- Regional mail pieces
- novascotia.com
- Transportation partnerships
- Tour operator partnerships
- Co-op partner advertising
- One-stop booking through Check In / novascotia.com / partners

Maximizing their experience while in Nova Scotia:

- VIC Programs
 - Provincially-operated VICs at strategic points
 - Local bureaus
 - Point of Sale kiosks



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Deliver quality experiences

Develop new and enhance existing product profiles:

- Write specific product profiles on categories such as:
 - Birding
 - Cuisine / wine
 - Music
 - Beaches
- Provide sufficient product and customer segment images
 - Identify specific image needs for future photo shoots
- Include on novascotia.com, Travel Guide, Travelways Map

Potential
Customer

Engaged
Customer

Converted
Customer

Satisfied
Customer

Repeat
Customer

Deliver quality experiences

Enhance the quality of the scenic driving tour experience:

- Evaluate the existing Travelways / Scenic Drives system throughout Nova Scotia from a visitor's perspective
- Develop and enhance two pull off areas at strategic scenic vistas
- Ensure major Travelways / Scenic Drives have clear scenic viewplanes by influencing management and maintenance initiatives
- Identify and prioritize strategic highways and travel corridors and communicate them to Transportation and Public Works for future improvements.

Deliver quality experiences

- Enhance the quality of experience and interpretation at existing museums, attractions, historic and natural sites:
 - Implement Living History (ie. Costumed animators) initiatives at historic sites, museums, communities to enhance the quality of our heritage product/experiences
 - As a follow up to Product Development Day, inventory and assess current travel experiences and facilitators (story tellers)
 - Develop and deliver educational workshops based on the Heritage Interpreter workbook (based on National standards)
 - Work with the Atlantic Canada Economuseum Inc. to identify opportunities to partner in the enhancement and delivery of NS sites
- Work with strategic festivals and events by conducting an economic impact assessment and identify opportunities for enhancement (ie. best practices, F&E development guide)

Deliver quality experiences

- Identify, support and facilitate the development and enhancement of key tourism destinations
 - Develop and deliver a presentation on product development opportunities/growth and Vision for Tourism to strategic geographic areas in Nova Scotia who meet the criteria for potential Geographic Areas
 - Work with strategic geographic areas to develop a comprehensive work plan that will build on their growth and development
 - Implementation of Sustainable Tourism Communities program to at least 4 communities / destinations

Experiential Touring > Scenic Touring

Deliver quality experiences

Star Generators:

- Create an inventory of proposed projects and develop a tourism prospectus on potential star generators
 - Identify tourism parameters for potential projects
- Identify, support and facilitate the development of new "Star Generators" based on established criteria
- Ensure existing Star Generators are providing a quality experience
 - Review and facilitate implementation of the recommendations from the Peggy's Cove Assessment to ensure quality of experience



Experiential Touring >

Cuisine and Wine

Awareness:

- Profile in Experiential touring advertising - inset images, video content; billboards
- Advertising in specialty magazines and direct mail
- Generate editorial through media FAMS for food writers

Engaging the Customer:

- Taste of Nova Scotia Dining guide
- Doers and Dreamers - lure section; listings; partner advertising opportunities
- novascotia.com - Web links
- Vacation idea books - lure; partner advertising opportunities

Making it easy to experience:

- Co-op advertising opportunities

Deliver quality experiences:

- Taste of Nova Scotia program
- Implement priorities of Cuisine / Wine Strategy



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Acadian Experiences

Awareness:

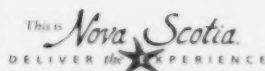
- ABA's #1 top event in Canada!
- Content in touring advertising
- Specific marketing in support of CMA
- Generating editorial through media FAMs
- Consumer trade show presence - Salon vacances

Engaging the Customer:

- Doers and Dreamers CMA lure page; inclusion in vignettes
- Information in Festivals and Events Guide (web and print)
- Distribute CMA travel planner with fulfillment
- Web links to CMA and Acadie 2003-2005

Making it easy to experience:

- Distribute CMA travel planner through VICs
- Point of sale material in VICs
- Check In and VIC counselor training
- Acadian regions identified on maps
- Signage



Experiential Touring>

Acadian Experiences

Deliver quality experiences:

- Participation in L'Acadie (CTACA)
 - Implementation of market-readiness program
- Develop an education tool (workshops) to inform tour guides about the history of Acadian regions (research & development)
- Facilitate the development of educational and tour experiences: (ie. Quilting, rug hooking, cuisine, music and dance)
- Deliver French SuperHost training throughout Nova Scotia
- Improve, revamp and expand the Ici on parle français program
- Increase 'French-readiness' opportunities and other product development, such as enhanced living history initiatives



Experiential Touring >

Golf

Awareness:

- Profile in experiential touring advertising - inset images, video content
- Advertising in specialty magazines and direct mail
- Generate editorial through media FAMS for golf writers
- Partner with Golf Nova Scotia at consumer shows
- Lever awareness with 2005 LPGA - BMO Financial Group Canadian Women's Open in Nova Scotia!

Engaging the Customer:

- Doers and Dreamers lure section; partner advertising opportunities
- Fulfill with Golf Nova Scotia Golf Guide
- Web Links

Making it easy to experience:

- Golf travel packages in Golf Guide
- Golf information in VICs

Deliver quality experiences:

- Enhancing market-readiness through partnership with Golf Nova Scotia

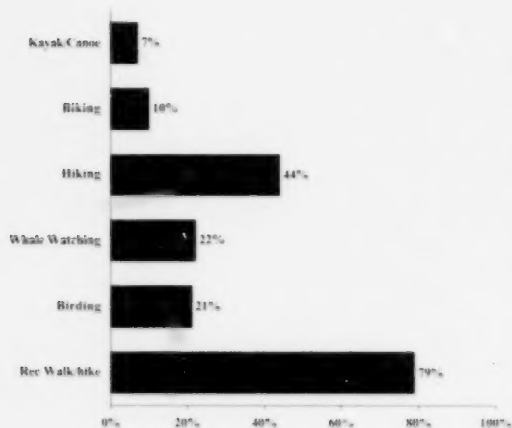


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Outdoor and Nature



Category includes:

- Kayak/Canoe
- Biking
- Hiking
- Whale Watching
- Birding
- Recreational Walking/Hiking

Source: 2002 Advertising Evaluation Study

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Outdoor and Nature

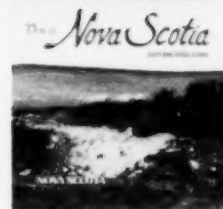
Awareness:

- High profile in experiential touring advertising - main images, video content
- Advertising in specialty magazines and direct mail
- Bay of Fundy Partnership Program with New Brunswick
- Generate editorial through media FAMs for writers

Engaging the Customer:

- Doers' and Dreamers' Guide - dedicated lure section; listing section; new index
- Nature & Outdoor Lovers' Guide in partnership with NSATA - lure content; searchable listings; links to partners
- Take a Hike brochure
- Lure content in Travel Guide and Bay of Fundy fulfillment

Take a Hike



Experiential Touring >

Outdoor and Nature

Making it easy to experience:

- Partnerships with tour operators
- novascotia.com - On-line partner packages
- Outdoor Guide - partner advertising opportunities
- VICs and Point of Sale Kiosks - Partners' brochure distribution

Deliver quality experiences:

- Work with campground owners and adventure tourism operators to enhance market-readiness
- Work with Department of Natural Resources on select provincial parks:
 - Implement recommendations based on Mystery Shop assessments
- Implement the Bay of Fundy Development Plan
- Support market-readiness program (Bay of Fundy Recommended Experience)



Deliver quality experiences

- Develop and implement industry development programs based on the identified needs of the tourism industry to ensure quality product, service and business practices:
 - Implement new initiatives through support to the Tourism Human Resource Council as outlined in its annual plan. New initiatives include creation of *Service First* ('next step' to SuperHost), on-line training programs and continue the delivery of service excellence programs
 - Support the development and implementation of training initiatives to address specific industry needs

Deliver quality experiences

Sustainability for the Future

- Tourism Resource Values Modeling pilot project
 - Determine the next steps for the implementation of this model
 - Provide tourism input on environmental assessments for developing project
- Understand and support the value and integrity of 'built heritage' (historic buildings and indigenous architecture) as it relates to tourism:
 - Develop product profiles based on our architecture and built heritage landscapes
 - Communicate to key partners (ie. Municipalities) the value of built heritage to tourism
- Explore alternative financing options for the development of the tourism plant:
 - Identify new financing partners and non-traditional partners for investment

Building a 12 Month Season



This is *Nova Scotia.*
DELIVER the  EXPERIENCE


NOVA SCOTIA
Tourism Partnership
COUNCIL

Building a 12 Month Season

Background:

- Major opportunity is within Maritime Canada
- Additional opportunity to capitalize on packaged product / low domestic air fares from longer haul markets (Toronto)
- Short getaways provide viable proposition
- Urban product important /competitive advantage within the region
- Winter Resort/Country Inn packages offer viable product
- Retail product offers 'trigger' purchase/critical to success
 - Provides immediacy to offer
 - Provides tangible vacation ideas
- Website as source for information and booking

This is *Nova Scotia.*
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Building a 12 Month Season

Primary Geographic Markets

- Nova Scotia (e-marketing and co-op program)
- Southern New Brunswick (Moncton and St. John primarily)
- Prince Edward Island

Demographic

- Female Skew
- Age 35 – 54
- HHI \$25,000 +
- Travel primarily by car
- Post-secondary education

Secondary Geographic/Demographic

- Toronto DMA / Couples Age 35 – 54 +, \$60,000 HHI, Couples, professional/managerial, postgraduate education
- These people are inclined to take spur-of-the-moment trips given the right incentive and timing. They are familiar with exploring vacations online and inclined to book online or via toll-free number.



Building a 12 Month Season

Programs for 2004:

- Industry Co-op Program
- On-line winter website/partner packages
- Partnership with Destination Halifax
- CanJet/CTC Partnership Program
- Print and electronic advertising to build awareness/reach



Building a 12 Month Season

Creating awareness

In Maritime Canada:

- Magazine – FP/FC ad in January issue of Saltscapes
- Direct Mail – 100,000 postcards distributed to households in Maritime Canada
- E-mail – Three phased frequency campaign to previous enquiries for winter product
- Radio

Outside Maritime Canada:

- Nova Scotia message with transportation partners:
 - CanJet and CTC
 - Newspaper advertising and e-marketing



Building a 12 Month Season

Engaging the Customer

Fulfillment:

- 2004 English and French Travel Guides include increased winter editorial and winter images in lure section of both books
- 20,000 "Great Inns and Outings" to be distributed along with Travel Guide in response to all enquiries for Winter product
 - "Great Inns and Outings" to be available at year-round Nova Scotia VICs and kiosks

Web:

- Dedicated section of novascotia.com to include winter product including coupons in downloadable format
- Web links to all partners offering winter product



Building a 12 Month Season

Making it easy to experience:

- Check In number and novascotia.com included in all winter advertising and promotional material
- Partnerships with CanJet and Destination Halifax
- Web content dedicated to winter
- Coupons online in downloadable format
- Coupon section includes links to packaged product

Building a 12 Month Season

Seven VICs to remain open year-round

- Provincial VICs:
 - Waterfront (Halifax)
 - International VIC (Halifax)
 - Halifax International Airport
 - Amherst VIC
- Local VICs
 - Chester
 - Bridgewater
 - Westville (hwy 104 rest area)
- “Great Inns and Outings” distributed to point of sale kiosks

Building a 12 Month Season

Delivering quality experiences

- Conduct specific research on emerging products and trends particularly with off-season potential
- Encourage the development of high-quality, value-oriented experiences targeted at off-season markets
 - Work with destinations and partners to develop product clusters to take advantage of pre-Christmas shopping, March break and winter getaways
 - Work with Taste of Nova Scotia and other partners to educate and facilitate the development of cuisine / wine and cultural experiences
- Enhance birding and nature observation experiences through further development:
 - Develop a birding site inventory / assessment by identifying development requirements (ie. access, observation sites, interpretation, signage)
 - Based on site assessments, work with partners to develop birding infrastructure at strategic sites
 - Develop a provincial birding interpretive brochure

Building a 12 Month Season

Deliver quality experiences

- Develop competitive winter tourism products and experiences
 - Work with Snowmobile Association of Nova Scotia (SANS) to develop an economic impact and market assessment for snowmobiling
- Enhance accessibility, visitor amenities, and develop premier coastal hiking/walking trails
 - Work with tourism operators along established coastal trails to encourage spring/fall destination hiking opportunities
 - Invest in trail enhancement initiatives on coastal hiking/walking trails (targeting 3 projects)
- Organize and deliver a Product Development Day workshop to address and encourage the development of seasonality opportunities:
 - On April 7, 2004, the next Product Development Day workshop will focus on seasonality. Objective is to educate, excite and energize industry and partners on seasonal tourism opportunities.

Meetings and Conventions



This is Nova Scotia.
DELIVER the EXPERIENCE

NOVASCOTIA
Tourism Partnership
C O N V E N T I O N S

Meetings and Conventions

Background:

- Major component of tourism industry
- Higher than average spending per visitor
- Programming is lead by Destination Halifax
- Destination Halifax focuses on opportunities that impact both HRM and the rest of Nova Scotia
- Province-wide benefits: Pre- and post- convention delegate visitation to rural areas among the highest in Canada

This is Nova Scotia.
DELIVER the EXPERIENCE

NOVASCOTIA
Tourism Partnership
C O N V E N T I O N S

Meetings and Conventions

Creating awareness

- Branding advertising in vertical publications complementary to direct sales focus
- Aggressive, high repeat, direct sales program
- In-market promotions
 - Ottawa, Toronto, Montreal, Washington
- Destination promotions at trade shows
 - CSAE, ASAE, CMITS, ICPA, Tête-à-Tête, CESSE, IACVB, GWSAE, Meet Canada, Trailblazers, Showcase Canada
- Media Relations
 - Leverage strength of Halifax and Nova Scotia business industry sectors

Meetings and Conventions

Engaging the customer

- Incorporate strong business case platform into customer-specific sales initiatives
 - Focus on reasons to buy
- Maximize local ambassadors as critical resources of influence on Meetings & Conventions site selection
- Work with industry to develop and merchandize innovative programming indigenous to the region
- Upgrade sales tools to enhance efficiency and effectiveness of market penetration initiatives
 - Dynamic sales presentation, lure brochure, M&C Planner, direct mail, website
- Media relations
 - Increase use of testimonials and third-party endorsements in support of Destination Halifax's performance

Meetings and Conventions

Make it easy to experience

- Website to facilitate electronic inquiry and serve as on-line shopping mall for site evaluation and assessment by meeting planners
- One-stop shopping and ease of connectivity to suppliers through Destination Halifax
- Ensure systems and processes distinguish Destination Halifax as competitively superior in timeliness and caliber of response to opportunity
- Extend reach of Destination Halifax membership to afford customers ease of access to broadest range of products and services throughout HRM and Nova Scotia



Meetings and Conventions

Deliver quality experiences

- Develop programming that reaches individual delegates early in the trip planning process
- Afford maximum opportunity for pre and post conference purchase
- Increase direct-to-delegate touch points in advance of event attendance
- Influence length of stay and potential for return visit
- Undertake proactive convention service programming in anticipation of need and demonstration of destination competency in the area of M&C hosting
- Provide on-site delegate travel counseling which enhances guest experiences, while affording opportunity to cross-merchandize extensive leisure product offerings



Group Tours and Cruise



Group Tours and Cruise

Background

Cruise

- Solid performance in 2003
- More global capacity in coming years - more affordable
- Good long long- term growth potential

Group Tours

- North American motorcoach market under pressure
- Intense price competition from cruise industry
- Hard-hit by health and safety concerns in 2003, e.g. SARS
- ACTP study in 2003 raised key question:
 - relevance to the "new senior"?
- Tour and Travel consultations

Group Tours and Cruise

Creating awareness

- Continued participation in CTC, ACTP and ACCA initiatives
- Familiarization tours in partnership with transportation providers, tour operators and industry suppliers
- Provide destination training to tour operator, cruise line and transportation provider staff
- In-market sales calls
- Attendance at in-market trade shows: NTA, ABA, USTOA, Bank Travel Conference, AAA Travel Marketplace, Atlantic Canada Showcase, OMCA, Bienvenue, RVC, Seatrade, Spotlight Canada, ITB (Berlin), etc.
- In-market promotions
- Limited travel trade advertising



Group Tours and Cruise

Engaging the customer

- Work with industry to deliver Nova Scotia products and services messaging to the travel trade in longer-haul markets
- Continue to develop and enhance sales tools
 - Dynamic sales presentation
 - Posters, lures (English, French, German), sales profile sheets, tour shells, etc.



Group Tours and Cruise

Make it easy to experience

- Continue to develop tour operator partnerships for the sale of Nova Scotia products and services
- Increase content targeting group tour and cruise on novascotia.com
- Increase frequency of Nova Scotia messaging to travel trade client

Group Tours and Cruise

Deliver quality experiences

- Enhance market-readiness of tourism suppliers through implementation of TradeSmart Program
- Develop a growth strategy for the tour market
- Continued participation on joint provincial/industry committees targeting group tours and cruise

Partnerships

- Partnerships are critical to our collective success:
 - Greater collective weight in the marketplace
 - Support the brand
 - Provide product content
- Your on-ramp to product development, sales and marketing programs:
 - Get the book!
 - Go online: www.nstpc.com



This is Nova Scotia.
DELIVER the EXPERIENCE

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